



SiteLink Web Mobile Edition Overview of Features

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Your SiteLink Team

Hidden Functions

Screen	CTRL-SHIFT	FUNCTION	Page Number
Edit Ledger	S	Show "Setup prepaid security deposit" button	Page 2
Maintenance	T	Show "Move ledger" button	Page 4
Utilities	R	Show "Reverse Daily Close" button	Page 7
Utilities	T	Show "Move ledger" button	Page 8
Backup	B	Allow selecting C:\ as backup destination	Page 9
Ledger Settings	D	Allow edit of move-in date/rent start date	Page 10
Past Due Tasks	W or R	Reset past due events	Page 11
Tenant Edit	D	Show "Test drivers license swipe" button	Page 12

Additional Information

Microsoft MapPoint Map Interface (Web Mobile Edition Only)	Page 15
This information is taken from Page 130, Paragraph 7 of the "SiteLink Web Edition Installation and Setup Guide"	
Web Edition Mobile – Insurance for Portable Units	Page 18
Web Edition Mobile – Additional Tax for Portable Units	Page 24
This information is taken from Appendix C "Mobile Edition Supplement" of "SiteLink Web Edition User Manual"	
SiteLink Web Edition Bulletin Board	Page 32

Show "Setup prepaid security deposit" button (Edit Ledger CTRL-SHIFT-S)

Go to: "Adjustments / Edit Ledger" and select a tenant or Unit.

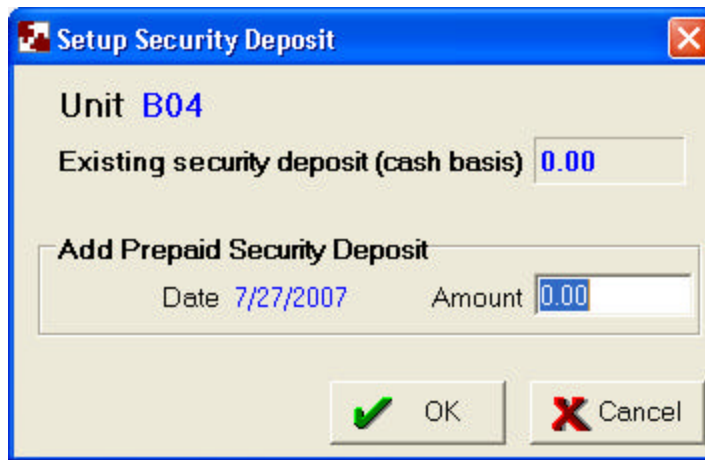
On the "Edit Ledger Screen" press "Ctrl-Shift-S "

The screenshot shows the 'Edit Ledger' application window. On the left, unit details for 'Berry, H' (Unit 206) are listed, including current due amount (\$0.00), rental rate (\$75.00), and lease information. On the right, a 'Payments' table shows a single entry for 6/7/2007 with receipt #69 and amount \$638.00. Below the table, three buttons are visible: 'Preview Receipt', 'Delete Payment', and 'Transfer Payment to Another Unit'. At the bottom of the window, a toolbar contains several icons. The 'Add Prepaid Security Deposit' button, represented by a pink plus sign icon, is circled in red. Other buttons in the toolbar include 'Notes', 'Adjust Charges', 'Ledger', 'Ledger Settings', and 'Delete Account'. The unit number '206' is also displayed in the bottom right corner of the toolbar area.

Payment Date	Receipt#	Amount
6/7/2007	69	638.00

Add Prepaid Security Deposit (Hidden Function): A hidden feature exists to add Prepaid Security Deposits to the Tenant's Ledger. On the "Edit Ledger" screen (shown above), press the following key sequence to display the hidden button: **"Control-Shift-S"**

The dialog box shown below will open. Enter the amount of the deposit and click "OK."



Setup Security Deposit

Unit B04

Existing security deposit (cash basis) 0.00

Add Prepaid Security Deposit

Date 7/27/2007 Amount 0.00

OK Cancel

The above is taken from Page 110 of the **SiteLink Web Edition Installation and Setup Guide**.

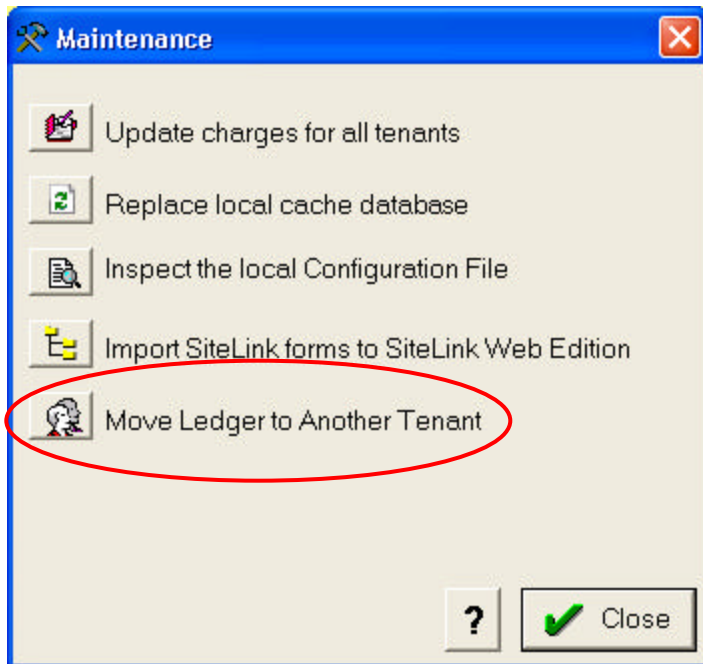
This feature is used when adding Security Deposits after a Database Conversion.

If the conversion does not bring over the Security Deposit OR when moving a Customer back into a Unit after moving them out, and needing to show the Security Deposit as paid.

Show "Move ledger" button (Maintenance CTRL-SHIFT-T)

Go to: "Company / Setup Checklist / Maintenance".

On the "Maintenance Screen" press "Ctrl-Shift-T"



This feature allows the Linking of Units that are separate.

Example: Two different Tenants from the same company that choose to have one Invoice sent to a Corporate Office for payment.

Transfer Lease from One Tenant to Another

BE CAREFUL

Transferring a lease should only be done to correct a mistake in moving the wrong tenant into a unit or to combine Units for billing purposes.

Tenant Name & Address

If the tenant name and address does NOT exist, first create it by going to “Operatons/Tenants”.

Transfer Lease

Move Unit 219

From Tenant

Pitt, B
6496088064

Name	Gate Code	Unit
Berry, H	7944280064	RV004
Chan, J	3969039360	105
		RV012
Gooding, C	7673359360	215
Hecker, M	9263637504	216
Jackson, S	5615706112	106
		211
		220
Jagger, M	4016860160	100
Jordan, M	2457129984	283
Kidman, N	3607011584	RV202
KIOSK, I	146235	B01
Pitt, B	1245343360	222
Pitt, B	6496088064	219
Spielberg, S	8036558336	RV001
Zeta-Jones, C	6206187008	102

To Tenant

Pitt, B
1245343360

Name	Gate Code	Unit
Aniston, J	7311853568	
Berry, H	7944280064	RV004
Borgnine, E	654321	
Chan, J	3969039360	105
		RV012
Cowell, L	7421337600	
Douglas, M	9150699520	
Gooding, C	7673359360	215
Hanks, T	1302888064	
Hecker, M	9263637504	216
Jackson, S	5615706112	106
		211
		220
Jagger, M	4016860160	100
Jordan, M	2457129984	283
Kidman, N	3607011584	RV202
KIOSK, I	146235	B01
Norton, E	4150343424	
Pitt, B	1245343360	222
Spielberg, S	8036558336	RV001
Zeta-Jones, C	6206187008	102

Transfer >>

Delete

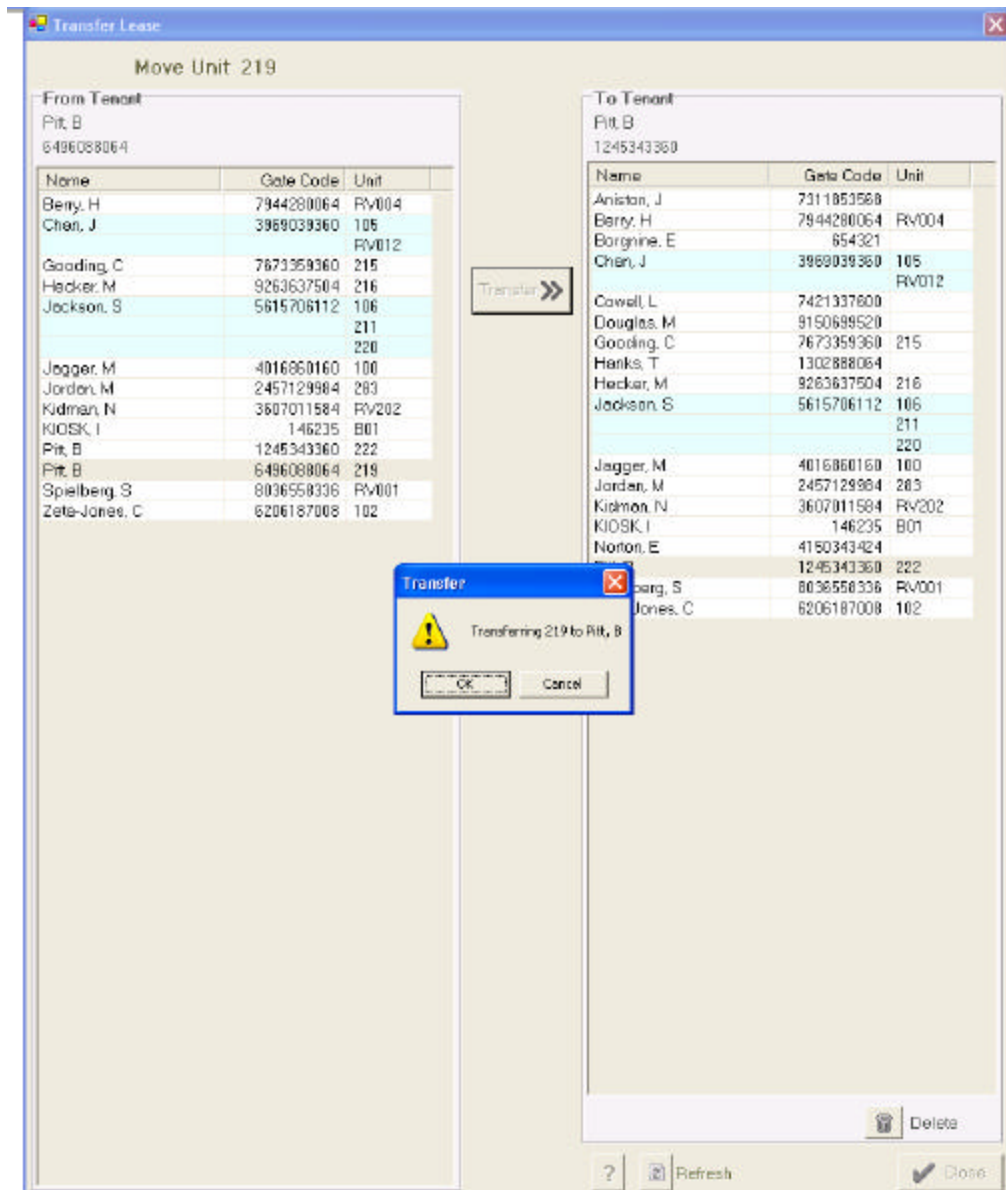
? Refresh Close

TRANSFER SCREEN

Go to: "Company / Setup Checklist / Maintenance" and on the "Maintenance Screen" press the following keys: "Ctrl-Shift-T" and the next screen will appear. If you have a larger database it may take up to a minute for the screen to completely fill in.

DRAW & DROP

Use your mouse to select the Unit on the left side of the screen and on the right side of the screen (destination) select the Tenant Name to move the Unit from one tenant to another to change the ownership of a lease. Be sure to click on Save & Exit before closing the window.



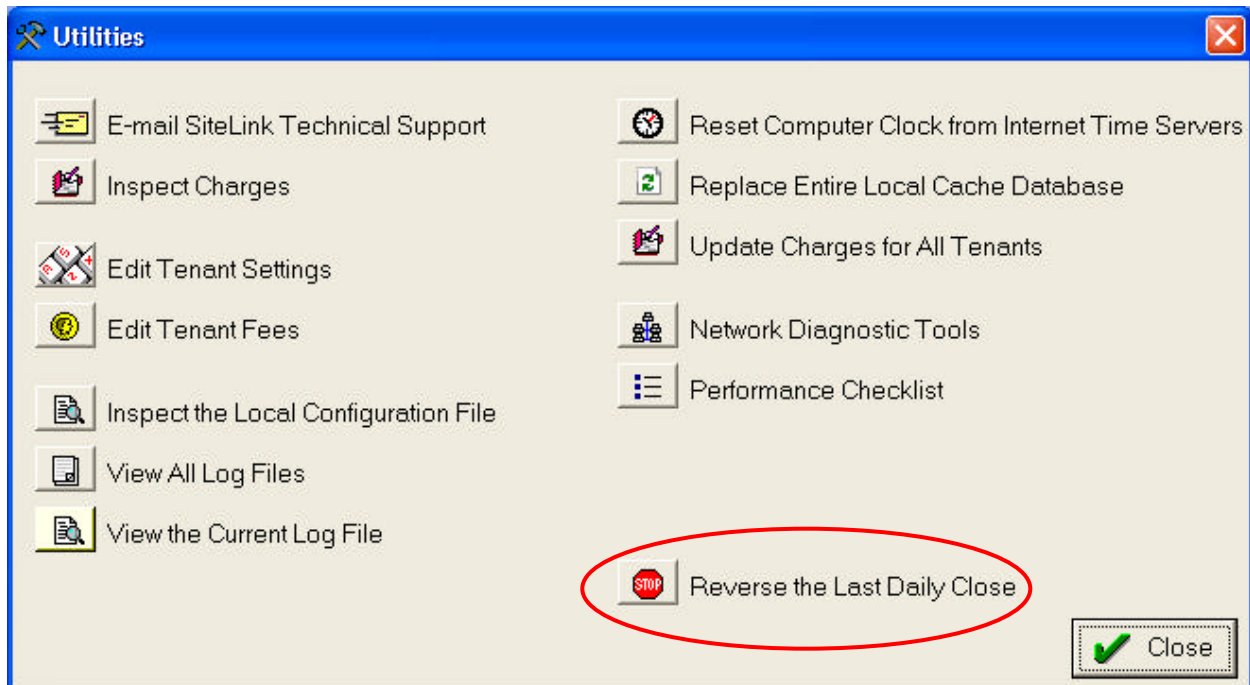
In the example (screen shot) above, the fictitious Tenant named "Pitt, B" is listed twice on the left side of the screen with a Unit Number (222 and 219) next to each name.

An error was made during the Move-In and a new Tenant Record was created instead of utilizing the existing Tenant. After making the selection and pressing the "Transfer Button" the above message will appear asking you to confirm the transfer.

Show "Reverse Daily Close" button (Utilities CTRL-SHIFT-R)

Go to: "Company / Utilities".

On the "Utilities Screen" press "Ctrl-Shift-R"

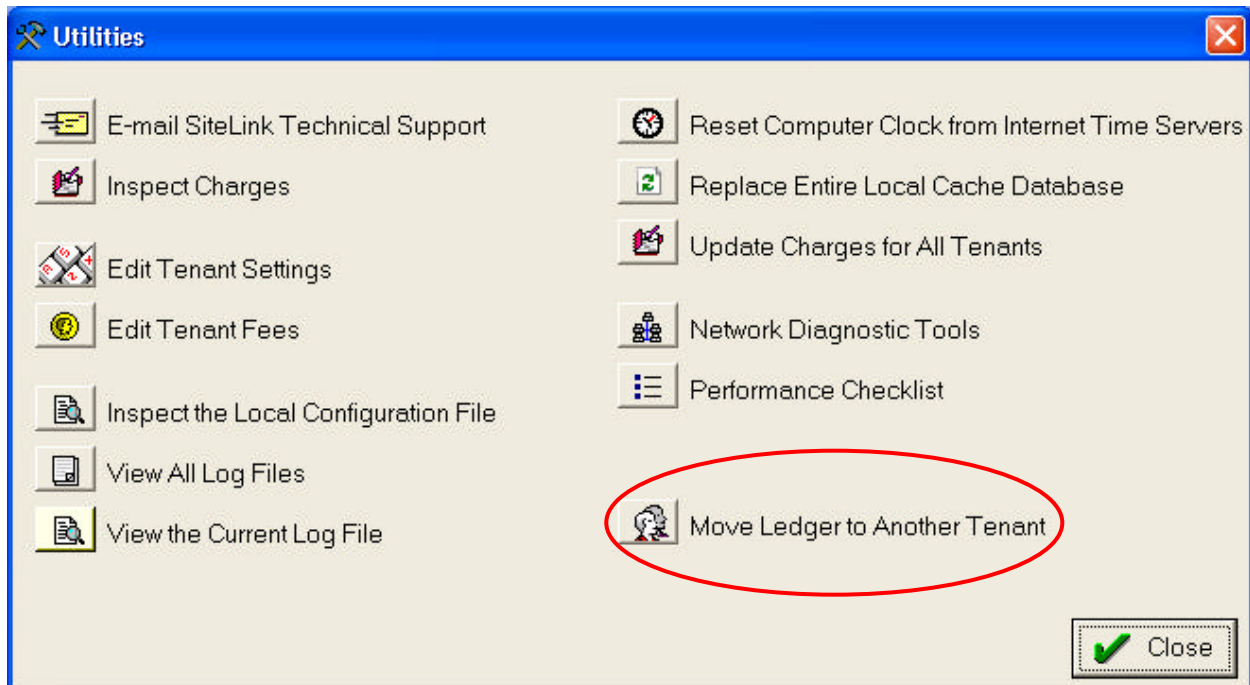


This feature allows the last Daily Close to be deleted or reversed. By reversing the close, the manager can now delete charges and/or payments which otherwise would not be permitted after a Daily Close.

Show "Move ledger" button (Utilities CTRL-SHIFT-T)

Go to: "Company / Utilities".

On the "Utilities Screen" press "Ctrl-Shift-T"



This feature allows the Linking of Units that are separate.

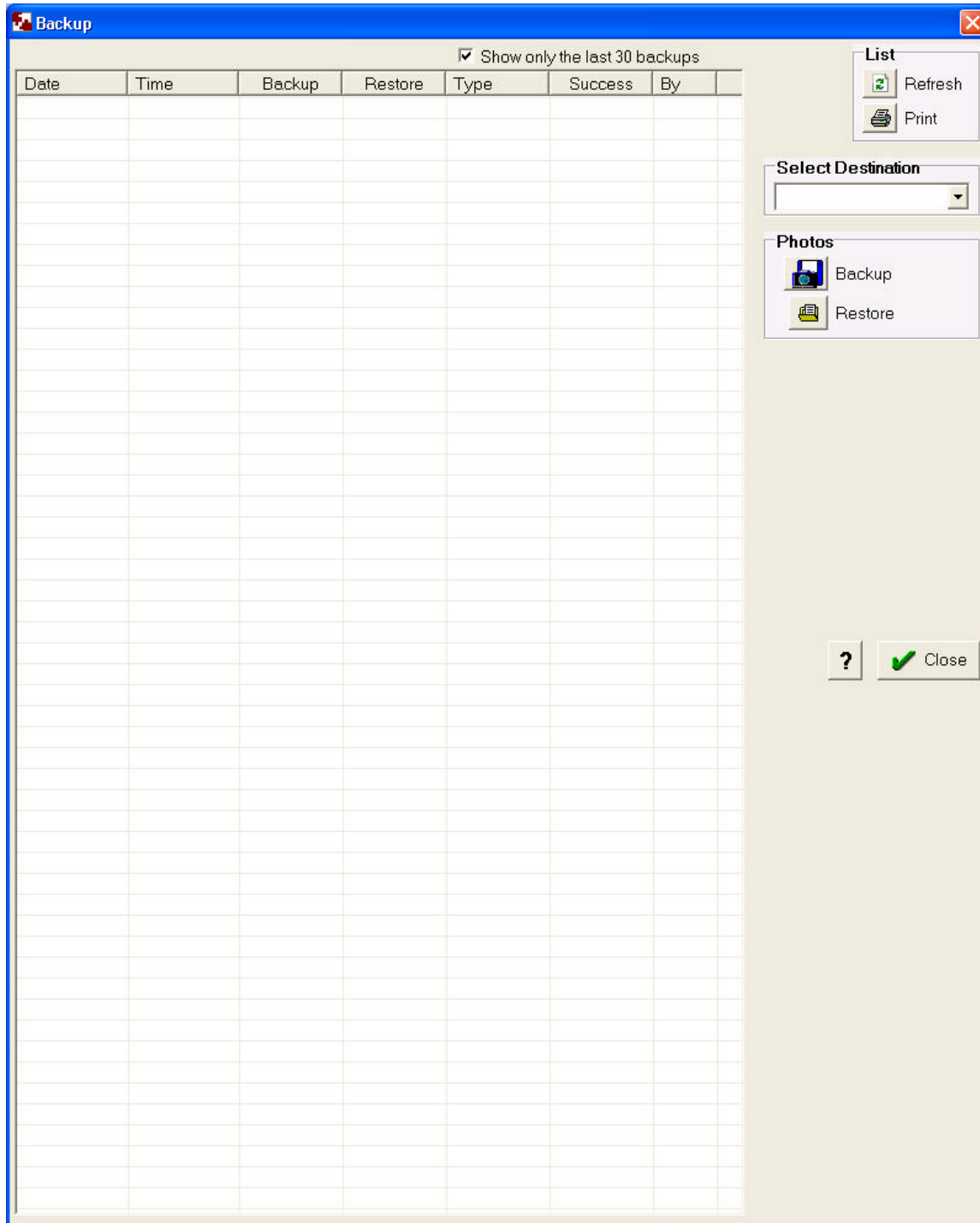
Example: Two different Tenants from the same company that choose to have one Invoice sent to a Corporate Office for payment.

Allow selecting C:\ as backup destination (Backup CTRL-SHIFT-B)

Go to: "Company / Backup".

On the "Backup Screen" press "Ctrl-Shift-C" to allow backing up to the "C" drive.

No button will appear but the backup will be allowed to the "C" drive.



This feature allows you to backup to your local "C" drive. Normally backups are done on a CD-Rom or Flash Drive, to ensure the safety of the data.

Allow edit of move-in date/rent start date (Ledger Settings CTRL-SHIFT-D)

Go to the "Edit Ledger" screen from either "Payments" or "Adjustments" and select a tenant or Unit.

On the "Edit Ledger Screen" press "Ledger Settings" to go to the Ledger Settings Screen" and then press "Ctrl-Shift-D"

The screenshot shows the "Ledger Settings" window for unit 204. The window is divided into several sections:

- Billing Period:** Radio buttons for Daily, Weekly, Monthly (selected), Quarterly, Semi-Annually, and Annually.
- Fees:** Fields for Late Fee #1 (15.00), Late Fee #2 (10.00), Late Fee #3 (0.00), Administrative Fee (10.00), Cut Lock Fee (10.00), NSF Check Fee (15.00), and Auction Fee (20.00).
- Scheduled Rate:** Fields for New Rent (0.00) and Effective Date (dropdown).
- Lease:** Fields for Lease Number (1008), Lease Date (9/25/2007), Move-In Date (9/25/2007, circled in red), and Rent Start Date (9/25/2007).
- Late Fees:** Radio buttons for "Late fees #1, #2, #3 are fixed amounts (shown above)" (selected), "Late Fee #1 is a percentage of rent", and "Late fee #1 conforms to the California Late Fee Schedule". Below is a "Percentage Late Fee Settings" section with a value of 0.000.
- Rates:** A table with columns for item, rate, and quantity. Items include Rent (65.00), Water and Electric (0.00), Extended Hours (0.00), and several other items with 0.00 rates.
- Marketing:** A button labeled "Marketing".
- Gate:** A checkbox for "Never Lock Out at Gate" and dropdowns for "Business Hours", "Time Zone", "All Keypads", and "Keypad Zone".
- Billing:** Fields for Purchase Order #, a checkbox for "Never Tax Rent", and an "Invoice" section with checkboxes for "Send an Invoice" (checked), "Charge Invoice Fee", and "Invoice Days Before Due" (15).
- Auto Bill:** Radio buttons for "None" (selected), "Credit Card", and "ACH Bank Debit". An "Edit" button and a field for "Auto Bill On Day Past Due" (0).
- Status:** Checkboxes for "Locked Out at Gate", "Overlocked", and "Had NSF Check".

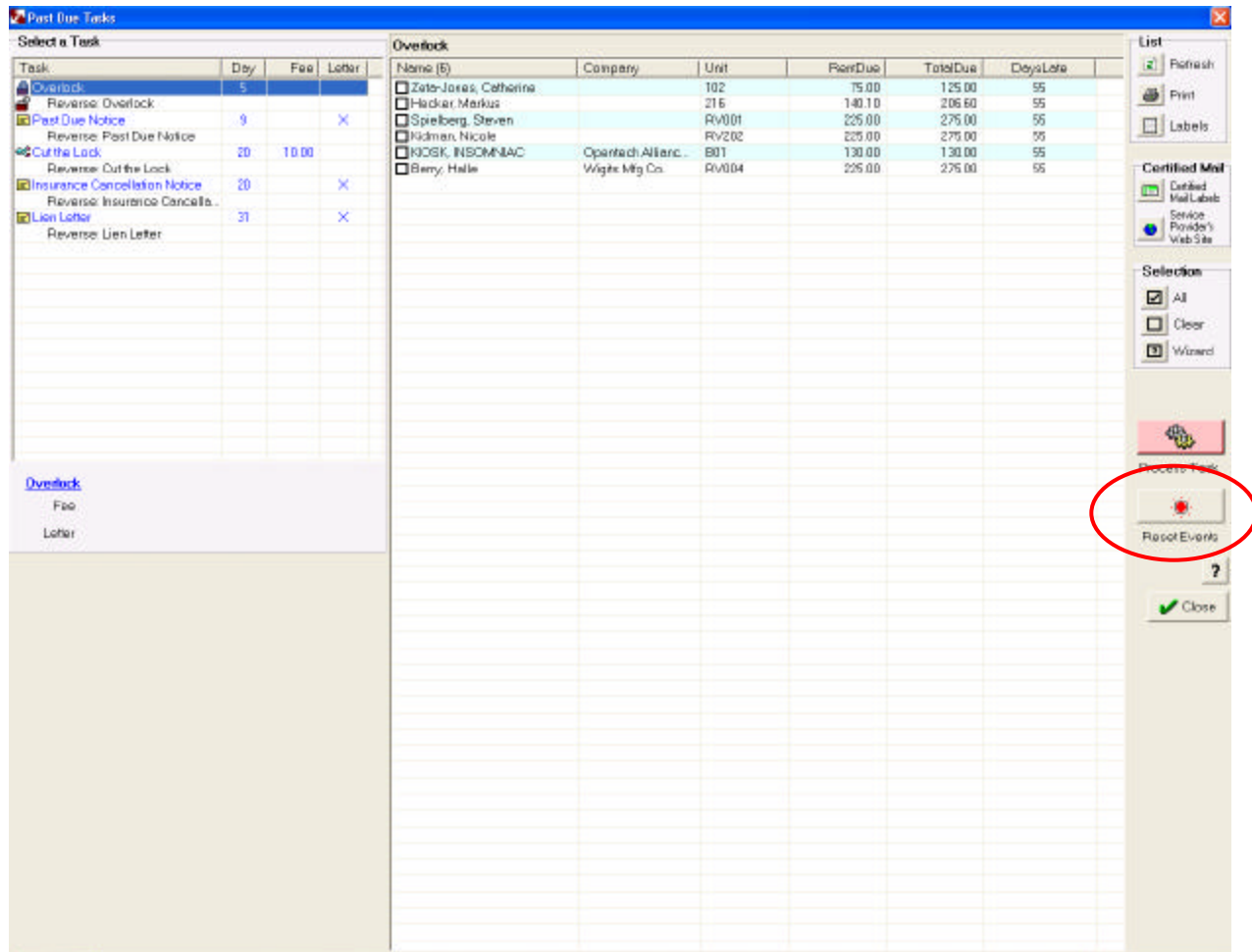
At the bottom right, there are buttons for "OK" (with a green checkmark) and "Cancel" (with a red X), along with a "204" label and a "Refresh" button in the top right corner.

This feature allows you to change or coordinate the Start Date of Rent. Normally you should not have a rent date before the Move-In or Lease Date.

Show “Reset Past Due Events” button (Past Due Tasks CTRL-SHIFT-R)

Go to: "Operations / Past Due Tasks Screen".

On the "Past Due Tasks Screen" press "Ctrl-Shift-R" OR "Ctrl-Shift-W"



This feature is normally used after a database conversion, when using SiteLink Web Edition for the first time.

If there are multiple “Past Due” items shown on the Reminders Screen, that normally should be done in a certain sequence, ie: Lien Notice before Auction Notice.

This function will allow you to reset the Past-Due Events.

Show "Test drivers license swipe" button (Tenant Edit CTRL-SHIFT-D)

Go to: "operations / Tenants".

On the "Tenants Screen" select the tenant and click "Edit".

On the "Edit Screen" press "Ctrl-Shift-D".

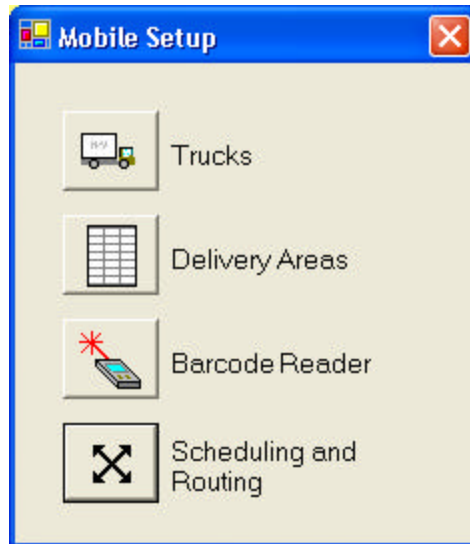
The screenshot shows a web-based form titled "Edit" for managing tenant information. The form is divided into several sections. The top section has tabs for "Primary Address", "Alternate", "Work", and "Additional", with "Primary Address" selected. The form contains various input fields for personal and contact information, including name, address, phone, and email. There are also fields for driver's license, license state, SS#, and date of birth. A section on the right has radio buttons for "Residential" (selected) and "Commercial", and checkboxes for "Tax Exempt", "Do Not Accept Checks", and "Never Lock Out at Gate". At the bottom, there is a "Gate Code" field with a "Make Random Code" button, a "Tenant Note" field, and a "Test Drivers License Swipe" button circled in red. The bottom right corner has "Refresh", "OK", and "Cancel" buttons.

Primary Address	Alternate	Work	Additional
Mr./Ms. <input type="text"/>			
First Name <input type="text" value="Morticia"/>		Middle <input type="text"/>	Drivers License <input type="text" value="999999999"/>
Last Name <input type="text" value="Adams"/>			License State <input type="text" value="VA"/>
Address <input type="text" value="1234 Mercury Dr."/>			SS # <input type="text" value="999999999"/>
City <input type="text" value="Elizabethtown"/>			Date-of-Birth <input type="text" value="6/6/2006"/>
State <input type="text" value="VA"/>		Postal Code <input type="text" value="34652"/>	<input checked="" type="radio"/> Residential <input type="radio"/> Commercial
Country <input type="text" value="USA"/>			<input type="checkbox"/> Tax Exempt <input type="text" value=""/> Tax Exempt #
Phone <input type="text" value="919-999-9999"/>			<input type="checkbox"/> Do Not Accept Checks
Company <input type="text"/>			<input type="checkbox"/> Never Lock Out at Gate
<input type="checkbox"/> Use the Company Name as the Tenant			
E-Mail <input type="text" value="none@none.com"/>			
Gate Code <input type="text" value="2122004224"/> Make Random Code			
Tenant Note <input type="text"/>			
Test Drivers License Swipe		Refresh	OK Cancel

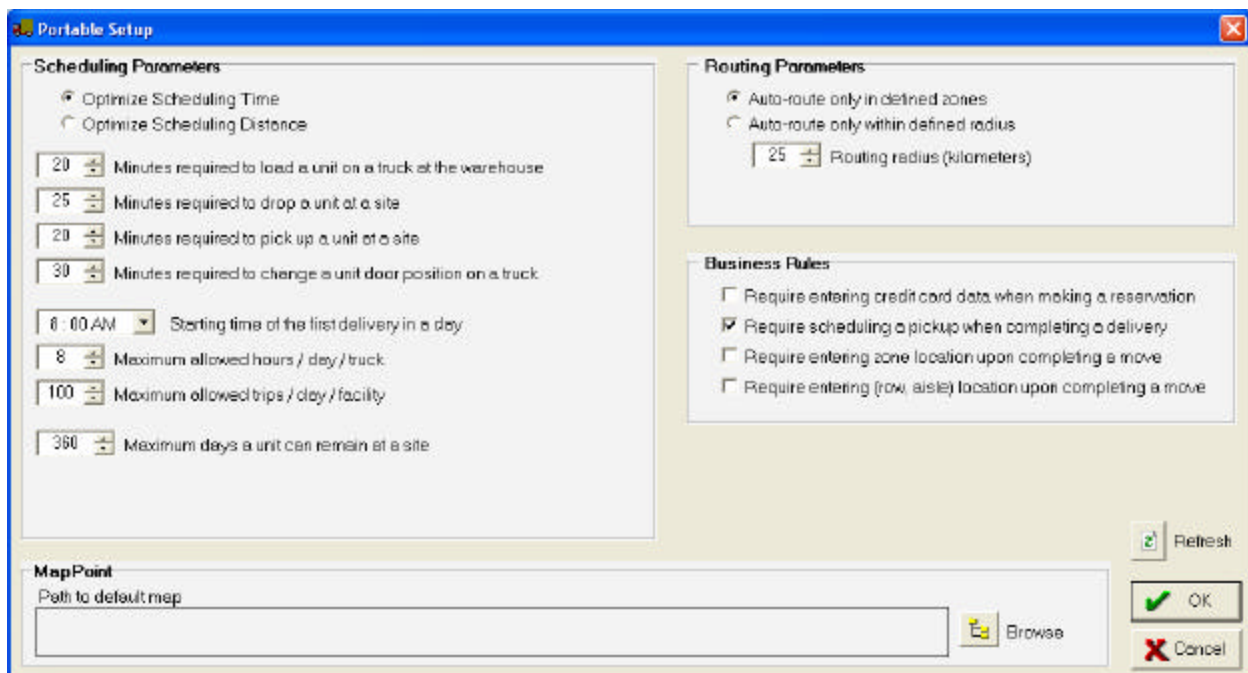
This feature allows you to test a 3-track reader to verify that the device is functioning.

Microsoft MapPoint Map Interface (Web Mobile Edition Only):

- a) If your default MapPoint Map is not located in the default location or is on a Network drive, go to “**Company / Setup Checklist / Portable Storage**” screen and open the “**Mobile Setup**” screen, shown below.



- b) To set the default map location, click on the “Scheduling and Routing” button.
- c) The Portable Setup Screen (shown below) will open.
- d) At the bottom of the screen click on the “Browse” button to locate the map you wish to use.



Using the Microsoft MapPoint Map Interface (Web Mobile Edition Only):

You MUST have purchased and installed Microsoft MapPoint 2002 (or later) in order to use this interface. To purchase this product contact your local software retailer or Microsoft.

The very first time you display the map the system default settings are used.

These settings are:

- ☐ Map measurement units are in miles.
- ☐ Display 4 map rings with a radius of 1, 3, 5, and 7 miles.
- ☐ Map rings are in blue.
- ☐ The information balloon for the site is visible.
- ☐ Panning of the map is not allowed.

You can change the defaults by clicking the **Set Defaults** button. This screen is described in detail below.

When you exit the map, SiteLink will save your settings. The next time you return to the map your settings will be restored.

Finding your way around

On the Map Toolbar, you are presented with several buttons with effect the view of the map. From right to left they are

Zoom out – this button decreases the zoom level

Zoom in – this button increases the zoom level.

Zoom to site – this button will restore the zoom level to the start up level.

Print – this button will print the current view of the map.

View/Hide Stats – this button will display the statistics for the map which include the number of customers within each ring on the map as well as the total number of customer on the map and the number of addresses that can not be mapped. Clicking the button again will hide the statistics box.

Refresh – This button will clear and redraw the map circles and recalculate the statistics.

Set Defaults – this button will display the Set Map Defaults screen where you can set the number, size and color of the map circles to be displayed. You can also set the measurement units for the map (miles or kilometers), whether panning of the map is allowed and whether the site information is to be displayed at startup.

Items on the Map

Each customer is displayed on the map by a pushpin icon. The icons are color coded red for residential customers and blue for commercial customers. Double clicking a pushpin will display the details for the selected customer.

Setting the Map Defaults

The defaults screen allows you to set the number, size and color of the map circles displayed on the map. To show a circle on the map check the box next to the circle number, enter the desired size in the Radius box and pick the color from the dropdown list.

You can also select whether the measurement units of the map are calculated in miles or kilometers from this screen. These units affect the radius of the map rings.

Panning is the ability of the map to shift what part of the map is displayed when the user clicks near the edge of the map. By default this feature is turned on. If panning is enabled it is possible to move the focus of the map away from the site. If this happens you can use the **Zoom to Site** button to return to the original display mode.

When the map is first displayed the location information for the storage site can be shown in an information bubble. If you do not want to display this information at start up then this feature can be turned off by selecting the Hide Info at Startup option.

Appendix C

Mobile Edition Supplement

Web Edition Mobile – Insurance for Portable Units

To use Insurance with Portable Units we need to first create a new recurring charge.

1. Click on “Company / Setup Checklist” and “Charges” to open the “Charge Defaults” screen.
2. Find an existing pre-defined “Recurring Charge” that is NOT currently in use.
3. Highlight the charge description and click “Edit.”
4. In the “Edit Charge Defaults” screen, change the description for the recurring charge to something like “Insurance-Mobile.” Leave the “Amount” field blank since the insurance charge amount may vary depending on the coverage selected.
5. Make sure to check the checkbox “Currently Used.”
6. If you wish to allow the Insurance charge to be prorated on Move-In, check the checkbox “Prorate at move in” (only used for First of Month Billing).

The screenshot shows a window titled "Edit Charge Defaults" with a blue header bar. The main title is "Insurance-Mobile". Below it, there are several input fields and checkboxes. The "Recurring Charge 5" field is highlighted. The "Description" field contains "Insurance-Mobile". The "Amount" field is set to "0.00". The "Tax #1 Rate (like 5.000%)" field is set to "0.000". The "Tax #2 Rate (like 5.000%)" field is set to "0.000". The "Total" field is set to "0.00". The "Account" dropdown menu is set to "Recurring Charge 5, 4084". Below these fields, there are three checkboxes: "Currently used" (checked), "Apply at move in" (unchecked), and "Prorate at move in" (checked). At the bottom, there are three buttons: "Refresh" (with a refresh icon), "OK" (with a green checkmark icon), and "Cancel" (with a red X icon). Below the checkboxes, there are two lines of text: "Changing charge defaults only affects new tenants." and "Edit tenant default fees separately."

Field	Value
Recurring Charge 5	Insurance-Mobile
Amount	0.00
Tax #1 Rate (like 5.000%)	0.000
Tax #2 Rate (like 5.000%)	0.000
Total	0.00
Account	Recurring Charge 5, 4084

☒ Currently used
☐ Apply at move in
☒ Prorate at move in

Changing charge defaults only affects new tenants.
Edit tenant default fees separately.

Refresh OK Cancel

7. Click “OK” to create the new charge.
8. Now that the charge has been created, it can be added to an existing Unit or added to a Unit at Move-In.
9. If you transfer the tenant to another unit, the recurring charge will be prorated based on the transfer date and any credits or charges will transfer to the new unit.

Adding Insurance Recurring Charge to Existing Tenant/Mobile Unit

1. Adding new recurring charge to an existing unit: Go to Payments and select the Tenant from the list and Click on the “Next” button.
2. On the “Payment” Screen, click on the button “Edit Charges and Payments.”
3. On the “Edit Charges and Payments” screen, add the new charge by selecting the newly created charge from the list. See the screen shot below.
4. Add the amount of the charge. If you wish to add a prorated amount, use the Prorate calculator to determine the amount and enter it here.
5. Quantity should be One (1).
6. The Charge Start date should be the same as the rent Due Date.
7. The Rate under “Recurring Billing” is the cost for insurance on this Unit for One Month.

The screenshot shows the "Edit Charges and Payments" window. The main area is a large grid with columns: Description, Invoice, Start, End, Quantity, Charge, Discount, Tax, Balance, Payment, Credit, Total. Below the grid are summary rows for Totals, each followed by a value of 0.00.

At the bottom left, there's a section for "Delete/Edit Selected Charge" with a trash icon and a "Delete" button. Next to it is a "Discount Plan" dropdown menu.

In the center-bottom, there's an "Add New Charge" dialog box. It contains a list of charge types: Administrative Adjustment, Administrative Fee, Auction Fee, Delivery Fee, Extended Hours, Insurance-Mobile, Invoice Fee, Late Fee, Late Fee #2, Lock Out Fee, NSF Fee. Each has a checkbox under a "Recurring" column. "Insurance-Mobile" and "Extended Hours" are checked.

To the right of the list in the "Add New Charge" dialog, there's a form for "Insurance-Mobile". It includes fields for "Charge" (0.00), "Quantity" (1), "Total after Taxes" (0.00), "Start" date (Thu Jul 19, 2007), and "End" date (Tue Jul 31, 2007). There's also a "Recurring Billing" section with "Rate" (0.00) and another "Quantity" field (1).

On the far right, there's a "Print" button at the top. Below it, a status area shows "Paid Thru New 7/31/2007", "Previous 7/31/2007", a balance of "100", and "OK" buttons with green checkmarks.

8. Click the “Add New Charge Button.”
9. Click “OK” to return to the “Payment Screen.”
10. On the Payment Screen, click “OK” to complete the transaction.
11. The new charge will be created each month when the rent charge is created.

Note: See page 30 and 31 (page 145 in the “SiteLink Web Edition User Manual”) for information on reporting.


Adding Insurance Recurring Charge to a Mobile Unit on Move-IN

1. Process the Move-In as normal from the Reservation screen.
2. On the “Charges” screen, add the new recurring charge by checking the checkbox.

The screenshot displays the 'Reservation' screen of a software application. The interface is divided into several sections:

- Account:** Displays the account name 'Aniston, Jennifer', 'Standard Rate 75.00', 'Tenant's Rate 75.00', and 'Move In 7/19/2007'. Below this is the 'Self Storage' section with radio buttons for 'First-of-Month', 'Anniversary', 'Daily', 'Weekly', 'Monthly' (selected), 'Quarterly', 'Semi-Annually', and 'Annually'. There are also checkboxes for 'Marketing' and 'Vehicle', and dropdown menus for 'Business Hours', 'Time Zone', 'All Keypads', and 'Keypad Zone'.
- Units:** A list of units with '233' selected under the 'Units (1)' header. Buttons for 'Add' and 'Remove' are present.
- Charges:** A table showing charges for 'Periods 1'. It includes 'Initial Rent 31.45', 'Additional Rent 0.00', 'Fees 0.00', 'Merchandise 0.00', 'Water and Electric 0.00', 'Extended Hours 0.00', 'Insurance-Mobile 1 0.00' (with a checked checkbox), and 'Tax-Mobile 0.00'. The 'SubTotal' is 31.45, 'Tax' is 0.00, and 'Total' is 31.45. An 'Add' button is next to the 'Insurance-Mobile' row.
- Billing:** Includes checkboxes for 'Never Tax Rent' and 'Tax Exempt', an 'Invoice' section with 'Send on Invoice' checked and 'Charge Invoice Fee' unchecked, and an 'Auto Bill' section with 'None' selected.
- Finish:** A vertical list of icons and labels: 'Dispatch', 'Credit Card', 'Photo', 'Save', 'Ledger Settings', 'Notes', 'Payment', 'Print Lease', 'E-Mail Lease', and a 'Finish' button.
- Summary:** At the bottom right, it shows 'Next Payment 150.00', 'Next Payment Due August 01, 2007', and 'Recurring Payment 75.00'. There is also a 'Cancel' button with a red X icon.

- Next click on the Plus Sign (+) next to open the “Edit Recurring Charge” screen to enter the amount of the charge (see below).

- Enter the “Rate” for the insurance on this Unit for One Month in the field on the left labeled “Tenant’s Rate”.
- Enter the Prorated amount in the field on the right labeled “Price”.
- To determine the prorated amount, use the Prorate calculator. 

- Click “Close” when all fields are completed to return to the “Reservation” screen.
- Complete the remainder of the Reservation/Move-In process as normal.
- The new charge will be created each month when the rent charge is created.

Web Edition Mobile – Additional Tax for Portable Units

For locations that use multiple tax rates on rent in addition to the two (2) provided, such as a Zip Code dependant Tax Rate, this tax can be added at move in by following the procedure below.

To use Additional Tax with Portable Units we need to first create a new recurring charge.

1. Click on “Company / Setup Checklist” and “Charges” to open the “Charge Defaults” screen.
2. Find an existing pre-defined “Recurring Charge” that is not currently in use, in this example we used “Recurring Charge 6.”
3. Highlight the charge description and click “Edit.”
4. In the “Edit Charge Defaults” screen, change the description for the recurring charge to something like “Tax-Mobile.” Leave the “Amount” field blank since the charge amount may vary.
5. Make sure to check the checkbox “Currently Used.”
6. If you wish to allow the Insurance charge to be prorated on Move-In, check the checkbox ““Prorate at move in” (only used for First of Month Billing).

The screenshot shows a software window titled "Edit Charge Defaults" with a blue header bar. The main content area has a light beige background. At the top, the title "Tax-Mobile" is displayed in blue. Below it, there are several input fields and labels: "Recurring Charge 6" (Default Description), "Tax-Mobile" (Description), "0.00" (Amount), "0.000" (Tax #1 Rate (like 5.000%)), "0.000" (Tax #2 Rate (like 5.000%)), and "0.00" (Total). A dropdown menu shows "Recurring Charge 6, 4085" and "Account". Below these fields are three checkboxes: "Currently used" (checked), "Apply at move in" (unchecked), and "Prorate at move in" (checked). At the bottom, there are three buttons: "Refresh" (with a refresh icon), "OK" (with a green checkmark icon), and "Cancel" (with a red X icon). Below the checkboxes, there are two lines of blue text: "Changing charge defaults only affects new tenants." and "Edit tenant default fees separately."

7. Click “OK” to create the new charge.
8. Now that the charge has been created, it can be added to an existing Unit or added to a Unit at Move-In.
9. If you transfer the tenant to another unit, the recurring charge will be prorated based on the transfer date and any credits or charges will transfer to the new unit.

Adding the Additional Recurring Tax Charge to Existing Tenant/Mobile Unit

1. Adding new recurring charge to an existing unit: Go to Payments and select the Tenant from the list and Click on the “Next” button.
2. On the “Payment” Screen, click on the button “Edit Charges and Payments.”
3. On the “Edit Charges and Payments” screen add the new charge by selecting the newly created charge from the list. See example below.
4. Add the amount of the charge. If you wish to add a prorated amount, use the Prorate calculator to determine the amount and enter it here.
5. Quantity should be One (1).
6. The Charge Start date should be the same as the rent Due Date.
7. The Rate under “Recurring Billing” is the cost for insurance on this Unit for One Month.

[illegible]

8. Click the “Add New Charge Button.”
9. Click “OK” to return to the “Payment Screen.”
10. On the Payment Screen, click “OK” to complete the transaction.
12. The new charge will be created each month when the rent charge is created.

Note: See page 30 and 31 (page 145 in the ”SiteLink Web Edition User Manual”) for information on reporting.

Adding the Additional Recurring Tax Charge to a Mobile Unit on Move-IN


1. Process the Move-In as normal from the Reservation screen.
2. On the “Charges” screen add the new recurring charge by checking the checkbox.

The screenshot displays the 'Move-In' software interface. The top-left section, titled 'Account', shows the name 'Aniston, Jennifer', 'Standard Rate 75.00', 'Tenant's Rate 75.00', and 'Move In 7/18/2007'. Below this is a 'Self Storage' section with radio buttons for 'First-of-Month', 'Anniversary', 'Daily', 'Weekly', 'Monthly' (selected), 'Quarterly', 'Semi-Annually', and 'Annually'. There are also checkboxes for 'Marketing' and 'Vehicle', and dropdown menus for 'Business Hours', 'Time Zone', 'All Keypads', and 'Keypad Zone'. The 'Billing' section includes checkboxes for 'Never Tax Rent' and 'Tax Exempt', and an 'Invoice' section with checkboxes for 'Send an Invoice' and 'Charge Invoice Fee', along with an 'Invoice Days' field set to 15. The 'Auto Bill' section has radio buttons for 'None' (selected), 'Credit Card', and 'ACH Bank Debit', and an 'Edit' button. The central 'Charges' section lists various charges: 'Initial Rent 35.90', 'Additional Rent 0.00', 'Security Deposit 0.00', 'Fees 0.00', 'Merchandise 0.00', 'Water and Electric 0.00', 'Extended Hours 0.00', 'Insurance-Mobile 0.00', and 'Tax-Mobile 1 0.00' (with a checked checkbox). The 'SubTotal' is 33.87, 'Tax' is 2.03, and the 'Total' is 35.90. The bottom-right section, titled 'Finish', contains buttons for 'Dispatch', 'Photo', 'Save', 'Ledger Settings', 'Notes', 'Payment', 'Print Lease', 'E-Mail Lease', and a 'Finish' button. The bottom status bar shows 'Next Payment 159.00', 'Next Payment Due August 01, 2007', and 'Recurring Payment 75.00', along with 'Back' and 'Cancel' buttons.

Charges	
Initial Rent	35.90
Additional Rent	0.00
Security Deposit	0.00
Fees	0.00
Merchandise	0.00
Water and Electric	0.00
Extended Hours	0.00
Insurance-Mobile	0.00
Tax-Mobile 1	0.00
SubTotal	33.87
Tax	2.03
Total	35.90

Next Payment: 159.00
Next Payment Due: August 01, 2007
Recurring Payment: 75.00

- Next click on the Plus Sign (+) next to open the “Edit Recurring Charge” screen to enter the amount of the charge (see below).

- Enter the “Rate” for the Additional Tax on this Unit for One Month in the field on the left labeled “Tenant’s Rate”.
- Enter the Prorated amount in the field on the right labeled “Price”.
- To determine the prorated amount, use the Prorate calculator. 

- Click “Close” when all fields are completed to return to the “Reservation” screen.
- Complete the remainder of the Reservation/Move-In process as normal.
- The new charge will be created each month when the rent charge is created.
- A Custom Report that breaks out the “Tax-Mobile” recurring charge by Zip Code is available from SiteLink Technical Support by request.

Running the “Recurring Charge Report” for Tenant/Mobile Units

1. Go to “Reports: Management.”
2. Choose “Recurring Charges.”
3. Set the “Reporting Date” you wish to use.
4. Set the “Select Period” you wish to use.
5. Set the “Sort By” setting.
6. At the bottom right, set the “Filter: Show” to select the recurring charge you wish to run the report for. In the example below the two recurring charges that were added are listed on the pull-down list, “Insurance-Mobile” and “Tax-Mobile.”

The screenshot shows a software window titled "Recurring Charges" with a blue title bar and a close button (X) in the top right corner. The window is divided into several sections:

- Reporting Date:** A dropdown menu showing "July 2007".
- Select Period:** A group of radio buttons with the following options:
 - ☐ Daily
 - ☐ Weekly
 - ☒ Monthly
 - ☐ Quarterly
 - ☐ Semi-Annually
 - ☐ Annually
 - ☐ Start & End Dates
- Sort By:** A table with two columns. The first column lists sorting criteria, and the second column has empty checkboxes for selection.

Sort By	
Unit	
Name	
Ending Balance	
Payments	
Tax1	
Tax2	
- Filter: Show:** A dropdown menu with a list of recurring charges. The current selection is "Water and Electric". The list includes:
 - Water and Electric
 - Extended Hours
 - Insurance-Mobile
 - Tax-Mobile

7. Click “OK” to create the report.

8. Sample report below for “Insurance-Mobile.”

Recurring Charge Activity - Insurance-Mobile												
Sunday, July 01, 2007 - Tuesday, July 17, 2007												
SiteLink Site, 3000 Highwoods Blvd, Raleigh NC 27604 TEL: 919-865-0789												
Unit	Name	Rate	Quantity	Total	Beginning Balance	Charge	Tax1	Tax2	Issued Credits	Payments	NSF	Ending Balance
108	Jagger, M	100.00	1	100.00	0.00					-200.00		-200.00
Totals	1				0.00	0.00	0.00	0.00	0.00	-200.00	0.00	-200.00

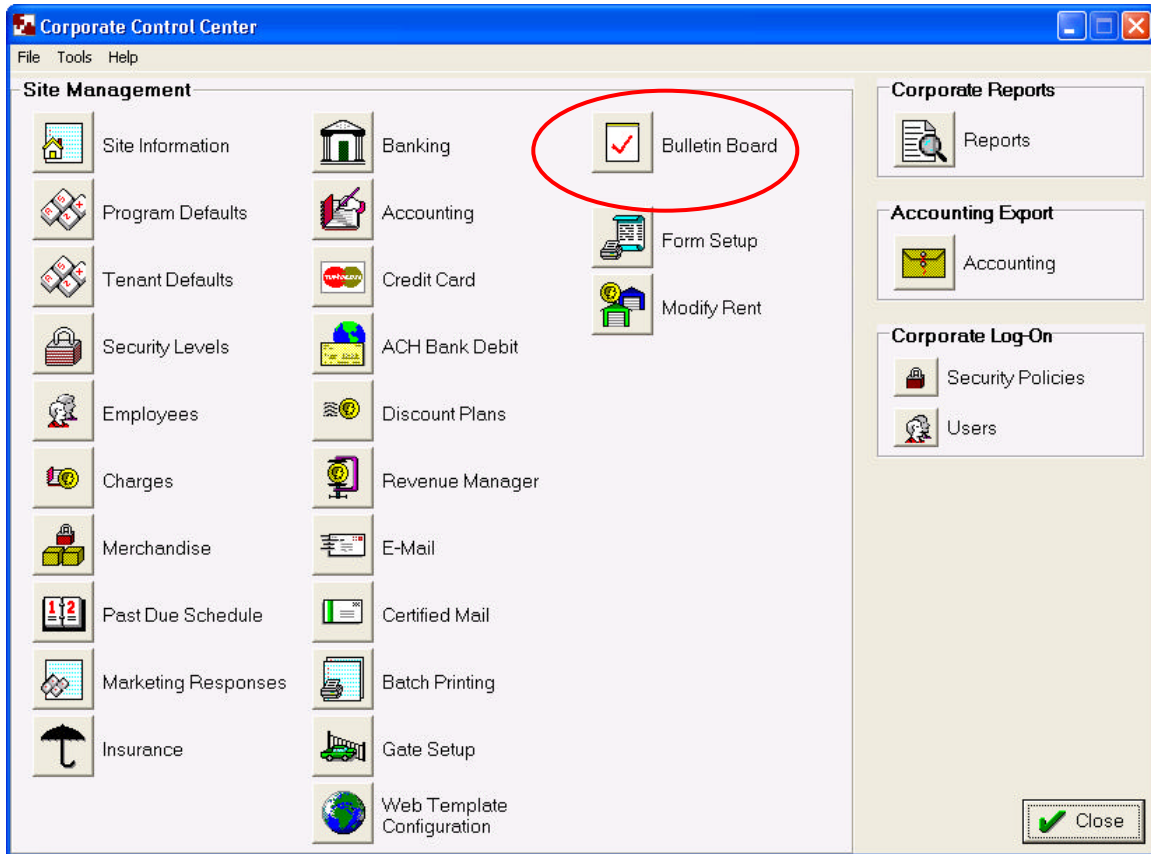
9. Sample report below for “Tax-Mobile.”

Recurring Charge Activity - Tax-Mobile												
Sunday, July 01, 2007 - Thursday, July 19, 2007												
SiteLink Site, 3000 Highwoods Blvd, Raleigh NC 27604 TEL: 919-865-0789												
Unit	Name	Rate	Quantity	Total	Beginning Balance	Charge	Tax1	Tax2	Issued Credits	Payments	NSF	Ending Balance
100	Jagger, M	75.00	1	75.00	0.00	15.00	0.00	0.00	0.00	-15.00		0.00
Totals	1				0.00	15.00	0.00	0.00	0.00	-15.00	0.00	0.00

10. A Custom Report that breaks out the “Tax-Mobile” recurring charge by Zip Code is available from SiteLink Technical Support by request.

SiteLink Web Edition Bulletin Board

- 1) Log onto “Corporate Control Center”



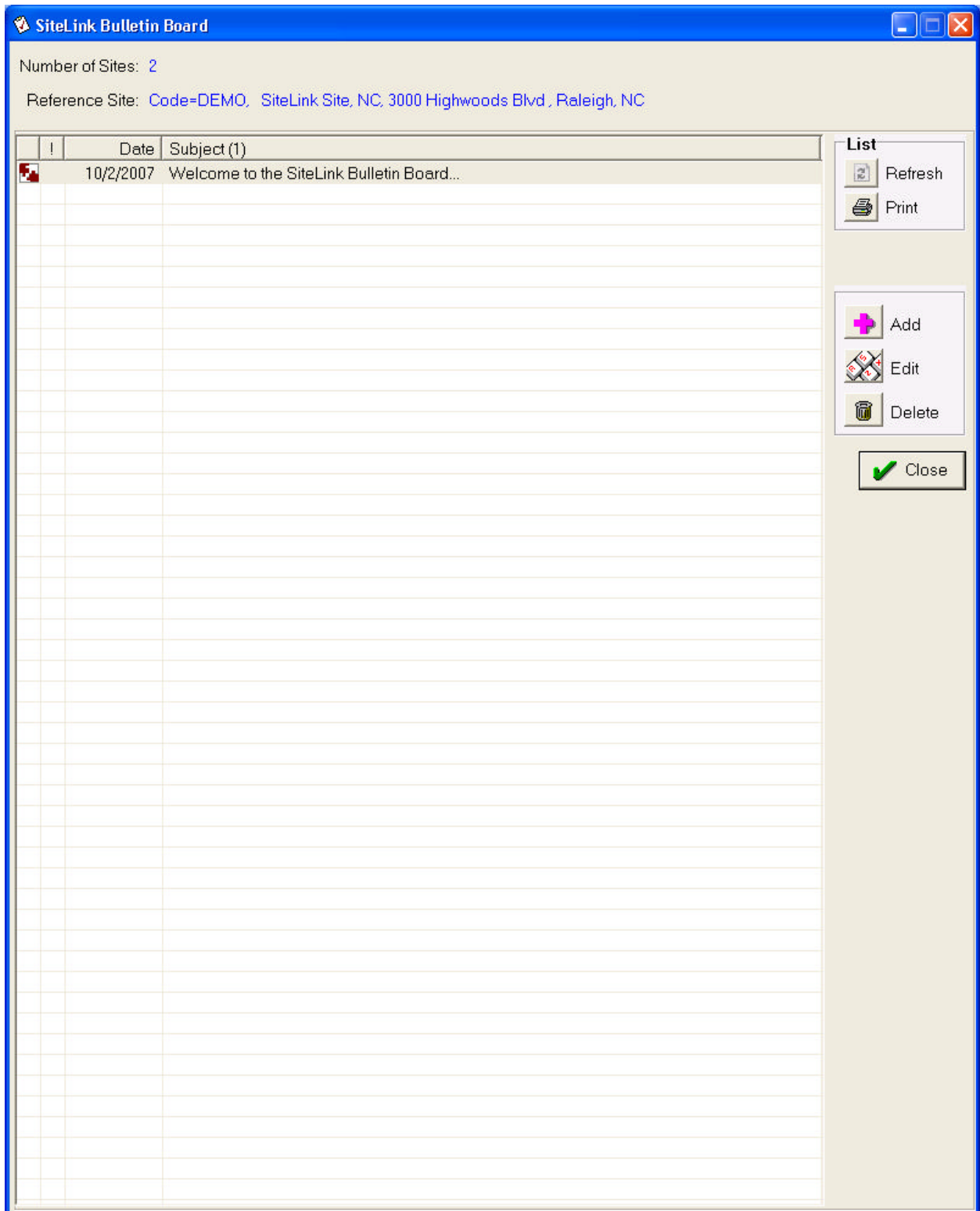
- 2) Click on the “Bulletin Board” button.

3) Select the Sites that you wish to see your message and then click “Next”.

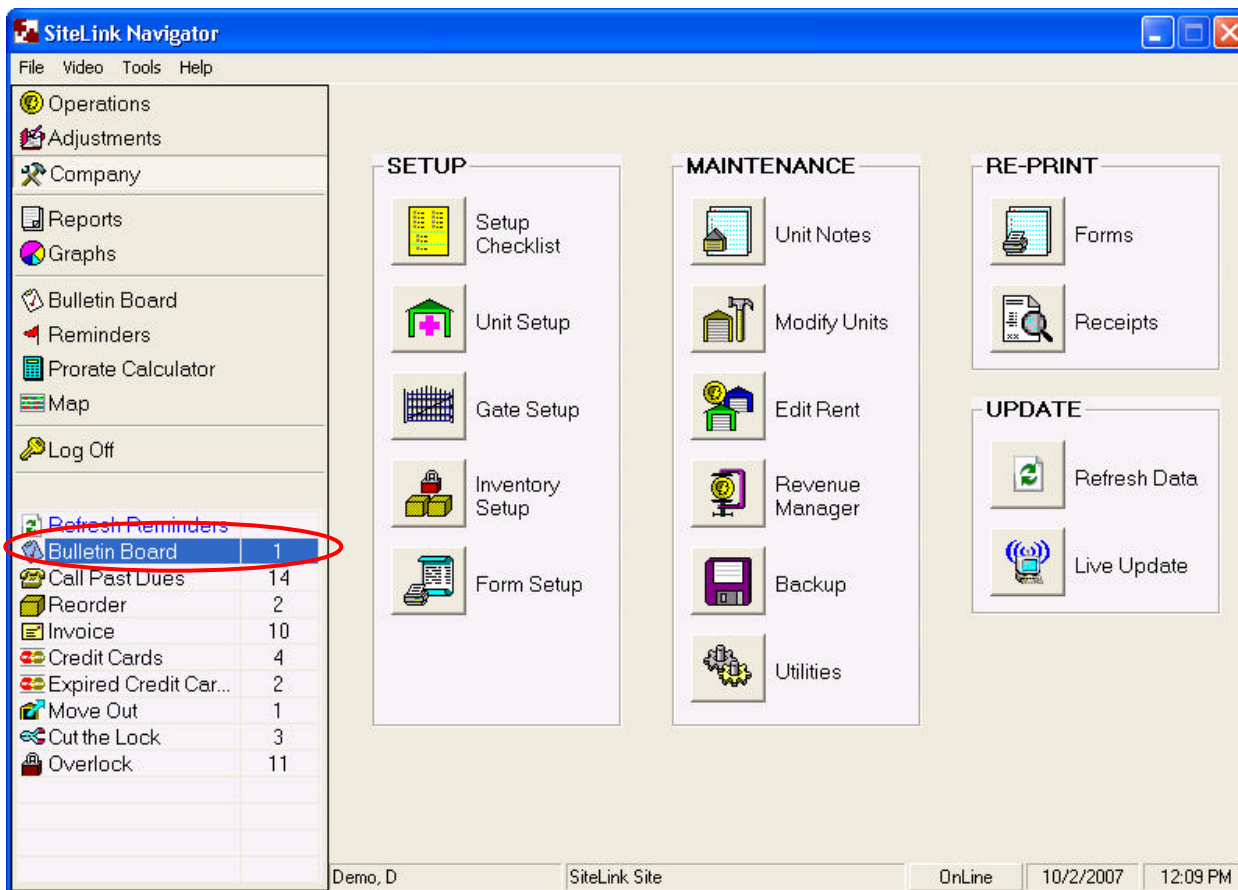
[illegible]

4) Select the reference Site and click Next.

5) The Bulletin Board will open. Click “Add” to enter a new message.



- 12) When the Users at the Site(s) you selected log onto SiteLink, the bulletin board will display your message(s).



- 13) If they already have the Program open, a reminder will appear (see above) for the Bulletin Board. If they select the reminder the message is displayed on their Bulletin Board.

